

CAPPS HR/Payroll User Group Meeting

Tuesday, March 25, 2025

9–10:30 a.m.

(Webinar Only)

I. Welcome/Announcements

- Symantec Protection Engine was rolled back on March 3, 2025.
 - The CAPPS team is working with the vendor to complete internal testing.
 - The CAPPS team will announce when agency testing begins.
 - Please continue to refrain from attaching .exe and .zip files.
- Key dates for the second-quarter *Military Workforce Summary Report* are:
 - **March 18** — Acknowledgment and Reporting forms are available.
 - **March 27** — Acknowledgment and Reporting forms are due.
- The newly revised *State Government Salary Administration Policies* course will be held on **Thursday, April 10, 2025**.
 - The course is designed for individuals currently handling salary-related tasks under statutory guidelines.
 - This is an in-person course only, which is held at the LBJ Building.
 - Registration closes on **Thursday, April 3**. Ensure that you obtain your management's approval before registering. All registration requests are reviewed before approval is granted.
 - Email capps.training@cpa.texas.gov if you have questions.

II. CAPPS HR/Payroll Production Updates

- The HR/Payroll Service Request (SR) Data for February 2025 included 691 new tickets opened and 795 tickets closed. There were 751 tickets carried forward from February into March.
 - Most new tickets were for the HR and Payroll modules.
 - This is a 25 percent reduction in tickets.
- The HR/Payroll release for March contains 13 requests consisting of eight break-fixes, five improvements and zero new features. Highlights include:
 - **SR-60100** — a break-fix to accurately compute the AGENCY SERVICE DATE to reflect all known updates for the agency. This fixes an issue with the date not updating correctly, especially when LEAVE OF ABSENCES are input.
 - **SR-60097** — a break-fix to suppress 0.00 hours pending approval in the TL manager's approval tile.
 - **SR-64551** — an improvement to inhibit the display of the AGENCY SERVICE DATE on the TX_EMPLYEES_CUR report for employees active in job codes ineligible for service credit.
 - **SR-65712** — an improvement to the *Benefit Contribution Report* that excludes optional life and basic life imputed income.
- The HR/Payroll release for April contains 11 requests consisting of five break-fixes, five improvements and one new feature.
- For the new HR/Payroll functionality being implemented in the April releases, three changes are highlighted for agency testing during user acceptance testing (UAT). Functionality and acceptance criteria:
 - **SR-60029**
 - **User Story:** *As a Time and Labor (TL) user, I want to use the Project Costing holiday modification to the cascade rule, so that the agency project costing hours on holidays are reflected correctly when transferred to CAPPS Financials.*
 - **UAT:** March 31 – April 4. Testers should validate the proper calculation of the HOLPC time reporting code (TRC) hours based on the REGHW or AGYHW time reporting codes (TRCs).

Note: Currently, only TPWD (agency 802) utilizes this functionality. This modification allows other interested agencies to configure Project Costing for their agency.

- **Migration to Production:** April 10.

- **SR-60043**
 - **User Story:** *As a benefits coordinator, I want the ERS Insurance Reconciliation report to correctly report employees enrolled in medical opt-out, who have insurance discrepancies and also add a full/part-time comparison of employees' FTE status so that I can make necessary payroll adjustments and ensure the employee's full/part-time status is aligned between CAPPS and ERS.*
 - **UAT:** March 31 – April 4. Testers should validate that both full-time and part-time employees with `OPTOUT` medical insurance, who have also elected vision insurance, no longer appear on the report as a reconciliation issue and that the full-time/part-time indicator comparison is now included on the report.
 - **Migration to Production:** April 10.
- **SR-61294**
 - **User Story:** *As an FMLA Administrator, I want the FMLA denial reason to display on the FMLA Events Status report for denied FMLA events so I can easily review why the FMLA event was denied.*
 - **UAT:** March 31 – April 4. Testers should run the report for various scenarios and validate that the correct denial reason(s) is/are listed as applicable.
 - **Migration to Production:** April 10.
- Five HR/Payroll enhancements are submitted for a vote to be added to the CAPPS HR/Payroll baseline. The SRs and their titles from the CAPPS Service Desk (CSD), along with the user stories and proposed solution summaries, are listed below. For complete details, please review the SRs within CSD. Agencies are encouraged to add comments to these SRs for consideration by the CAPPS Steering Committee following their next scheduled meeting on April 8.
 - **SR-66576 – Report Listing Direct/Indirect Reports (suggested via `ENH-61305`)**
 - **User Story:** *As a Core Human Resources (HR) user, I want to run a report that shows the direct and indirect reports, so that agency users can retrieve this information with various criteria.*
 - **Proposed Solution Summary:** Provide the number of positions filled and vacant for both direct and indirect `REPORTS TO` by various criteria provided on the run control page.
 - **SR-66908 – Leave Liability Report Format Enhancement (suggested via `ENH-61800`)**
 - **User Story:** *As a TL Superuser, I want the Leave Liability Report by fund to include fund totals and also include a second unformatted Excel report, so that fund totals are available, and the Excel format may be filtered and sorted easily.*
 - **Proposed Solution Summary:** Add fund totals to the PDF report. Add two worksheets to the Excel report (Fund Totals-Summary and Company Totals). Remove column merging on the Excel report.
 - **SR-66909 – Time Calendar Page Enhancement (suggested via `ENH-61389`)**
 - **User Story:** *As a TL User, I want to have a way to distinguish between active and/or terminated employees in Time Calendar Page display options, so that users can utilize the page more effectively.*
 - **Proposed Solution Summary:** Add checkboxes under the display options for `ACTIVE` and `TERMINATED` statuses. The users will be able to select the desired status and display the result accordingly.
 - **SR-66911 – Query for Termed EE with Outstanding Leave Balances (suggested via `ENH-61369`)**
 - **User Story:** *As a TL Superuser, I want a query for termed employees with outstanding leave balances, so that we can track and manage the balances in a timely manner.*
 - **Proposed Solution Summary:** Develop a PS query to fetch an agency's terminated employees with outstanding leave balances.
 - **SR-66917 – Modify the Date Restriction for Nominating Participants (suggested via `ENH-61036`)**
 - **User Story:** *As a manager, I want to nominate participant evaluators based on their collaborative experience with my direct reports as of the current date, so that I can gather additional insight into my direct reports' job performance.*
 - **Proposed Solution Summary:** The search for performance management participants will be based on the current system date rather than the evaluation `PERIOD BEGIN DATE`.

III. On the Horizon

- The Texas Comptroller of Public Accounts has a statewide biennial update process for authorizing employees to request data changes. Only properly authorized employees may request data changes to the statewide payroll and personnel systems.
 - Signature recertification is due by **May 31, 2025**.
 - By May 31, 2025, each agency and institution of higher education must submit names of authorized employees according to the Authorizing Employees to Request Data Changes to Statewide Payroll/Personnel Systems.

- All authorizations previously on file will expire on **May 31, 2025**.
- Beginning **June 1, 2025**, only newly authorized state employees may request data changes.
- Mail authorization documents with original (wet) signatures to:
Texas Comptroller of Public Accounts
Fiscal Management Division
Lyndon B. Johnson State Office Building
ATTN: HR/PY Agency Services
111 East 17th Street
Austin, TX 78774
- An SR will be opened on **April 1, 2025**, on behalf of all central agencies to ensure a LOA Signature recertification is submitted.

IV. Features & Spotlights

- CAPPS will upgrade PeopleTools from 8.60.10 to 8.61.07 on **Aug. 4, 2025**.
 - User Acceptance Testing will occur **from April 7 to July 18**.
 - Please test high-level business processes in UAT3.
 - Query Viewer and/or Query Manager access available **May 12, 2025**.
 - Please track all upgrade-related issues via the *Upgrade & Expansion Project Assistance* catalog item in CSD with a Request Type of *Other*.
 - The new Accessibility icon allows quick access to the following from any dashboard:
 - *Screen Reader Mode* — to turn off screen reader mode, navigate to **General Settings**.
 - *Keyboard Shortcuts*.
 - *Accessibility Help* — provides information about the screen reader mode, page layout in screen reader mode and keyboard shortcuts.
- Effective **March 13**, the header information on timesheets is now titled *Leave Accrual Service Date*. This change will reduce confusion for return-to-work retirees, for whom the previous title (*State Service Effective Date*) is not accurate as it pertains to the accrual of leave.
 - For regular employees, accruals are based on the STATE SERVICE EFFECTIVE DATE.
 - For return-to-work employees, accruals are based on the RTW SERV DT.
- A new *OK to Pay Summary* hyperlink was added to the **By Payline** and the **By Paysheet** pages.
 - Selecting this hyperlink displays a table with relevant information about the payline, including the OK TO PAY indicator for each line.

V. Open Forum/Q&A

- No questions were submitted to the *Ask Us Anything* survey for March; however, we did receive feedback regarding our ticket processing. We want to let you know that the feedback has been acknowledged and we also want to thank you for taking the time to submit it. We will take your feedback to our teams and address it accordingly.
- We accept all kinds of feedback; If you are referencing a specific service request, please include the SR ticket number or topic so that we can follow through diligently.

VI. Deep Dive Topic

- In an effort to provide a better user experience, the CAPPS team will decommission the reporting environments RPT1 and RPT2 and move the querying function into the Production (PRD) and UAT1 environments.
 - Users no longer need to leave the PRD (or testing) environment to pull queries, which now runs against real-time production (or test) data.
 - The CAPPS team will assign the Query Viewer, Query Manager and Query Scheduler roles in the PRD environment.
 - Private and Public queries will be copied from RPT1 into PRD.
 - If query capability is still needed, access will be treated like a standard security request for new access in PRD; **any needed role(s) must be requested by your ASC through the Security Request System (SRS)**.
 - Please test your access to UAT1 now (for testing during UAT).
 - Each user needs to test their private queries, any regularly run public queries and CAPPS BI Publisher reports to ensure they are available and all run properly.
 - The Comptroller's office will be working with all Level 1s and ASCs to provide details on current users and roles in RPT to help facilitate the transition.

VII. Wrap-up/Close Meeting

- Submit ideas or suggestions for future user group discussion to: capps.product.team@cpa.texas.gov
- To be added to the distribution list for the user group meetings, email: capps.cgc.ba@cpa.texas.gov